

## The Aragon Research Globe™ for Corporate Learning, 2019

### The Shift to Learning Journeys—Powered by Skills and Content

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Author: Jim Lundy

Topic: Learning, Talent Management

Issue: Who are the vendors that are making a difference in learning?

### Summary

The eighth annual Aragon Research Globe™ for Corporate Learning examines 19 major learning providers. Enterprises need to ensure that employees and customers have a great learning experience and are seeking out providers that can deliver knowledge, just-in-time learning, and compliance-related training.



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## The Shift to Learning Journeys—Powered by Skills and Content

### TABLE OF CONTENTS

Introduction.....3

    The Need for Skills—The Answer Is Learning Experiences ..... 3

    The Race to Skills and Competency Starts with Content ..... 3

    Leaving the LMS Era and Shifting to Learning Journeys.....4

    Custom Content is the Missing Link to the Complete Learning Experience ..... 6

    Microlearning and the Lessons from Sales.....6

    Learning Communities—The Evolution of Social Learning .....7

    Mobility Continues to Be a Critical Success Factor ..... 7

    Video Learning as a Catalyst for Knowledge Retention.....7

    Predictive Analytics: Tying Performance to Knowledge.....8

    Learning Assistant Versus Support Chatbots.....9

    Enterprises: Balancing the Focus on Employee Engagement Versus Operational Success....9

Aragon Research Globe Overview.....10

    Dimensions of Analysis ..... 10

    The Four Sectors of the Globe ..... 11

    Inclusion Criteria..... 11

    Exclusions ..... 12

The Aragon Research Globe™ for Corporate Learning, 2019.....13

    Leaders..... 14

    Contenders..... 22

    Innovators..... 26

    Specialists ..... 32

Aragon Advisory.....33

Bottom Line.....33

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## Introduction

Learning continues to be a growing focus in the enterprise and today the biggest challenge for managers and L&D is to power just-in-time learning experiences for users. Part of this is fueled by the growing C-Suite reality that skills are critical to growth and that employee engagement is particularly tied to a regular learning experience.

This means that while learning is sold as part of a talent suite, it is also being purchased as a best of breed application. The sheer demand for more learning content has fueled the growth of firms such as Degreed and Skillsoft, and others that have invested significantly in content, such as Cornerstone and Saba.

In 2019, microlearning and learning experience/delivery have become more strategic. In fact, it has become so critical that in sales that a micro-market that Aragon calls Sales Coaching and Learning has emerged. Digital transformation requires a degree in knowledge and knowhow—this is where modern learning comes in. It is critical to make learning a continuous part of work rather than a sporadic engagement. Learning is not a one-and-done operation.

Trends, issues, and challenges that affect business today can and will change tomorrow, and associates need access to tools that enable troubleshooting and performance improvement. Part of the solution will include analyzing providers that offer a modern user experience and can deliver just-in-time learning. The Aragon Research Globe™ for Corporate Learning, 2019 evaluates 18 technology and service providers that allow enterprises to manage and deliver all forms of learning.

## The Need for Skills—The Answer Is Learning Experiences

Business leaders from the C-Suite down are demanding a more prepared workforce and the market has responded with learning experience, which Aragon feels is part of the modern corporate learning approach. While there has always been a critical need in extended enterprise settings for training for customers and partners, the battle cry in the enterprise is skills, courses, and a better overall experience. Many of the current corporate learning providers have repositioned their offering to include learning experience—a more engaging and consistent way to delivery knowledge on a regular basis. At the same time, employees and customers desire a modern approach to learning and want to make learning an integral part of their professional role and how they buy products and services. To meet these needs, a complete approach to learning is a requirement; simply having a learning infrastructure in place is no longer sufficient.

The current market trend is driving all learning providers to shift their focus from admin features to learner capabilities.

## The Race to Skills and Competency Starts with Content

Content, which is part of a curriculum, has made a huge comeback in learning because users are demanding more access to better courses. The shift to learning providers that enable access to all kinds of courseware has emphasized content as a must-have feature for enterprises. In 2018, learning pivoted to focus more deeply on content and courses that provide content, including courses in the form of shorter segments. This demand has forced learning providers to partner for, acquire, or refresh

learning content. Given the growth of content, there has also been increased interest in providers that can manage course content from a variety of sources, including video. Both are integral components to the modern learning platform (see *Figure 1*).

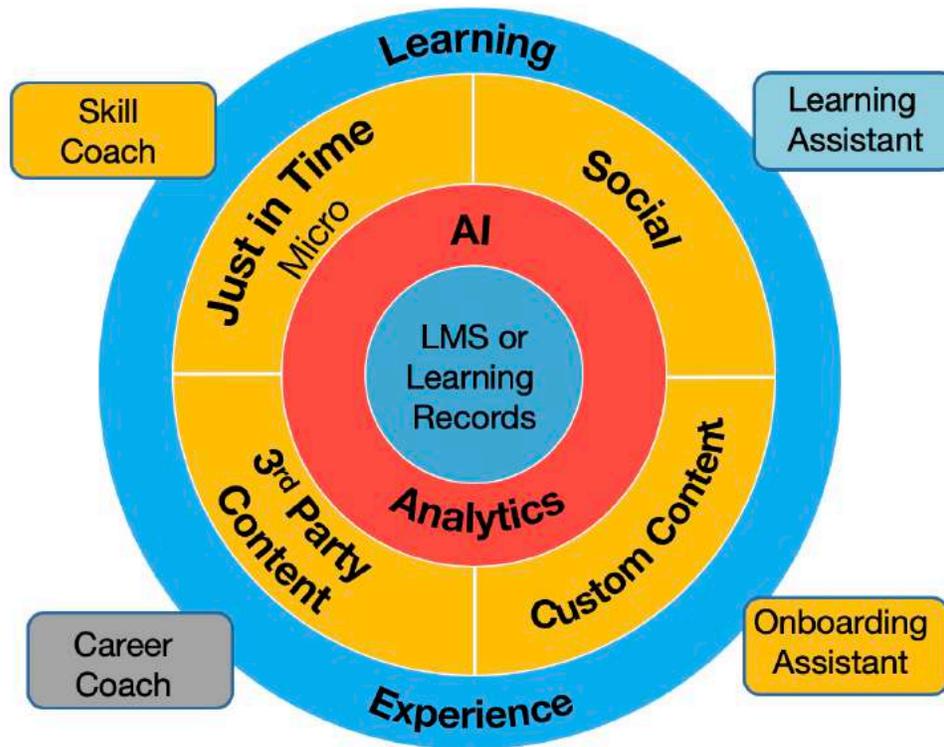


Figure 1: The learning market is shifting to a focus on learning experience and will be infused with learning assistants.

### Leaving the LMS Era and Shifting to Learning Journeys

The demand today for learning is not for a great LMS, it is for a great learning experience that includes more choices for content. In the enterprise there is a need to go beyond compliance-based training to skill- and enhanced role-based training. Learning experience is the focal point of learning today.

For the extended enterprise, smart enterprises have been offering training for products and services for years. Those enterprises are ahead of the curve. The need to make great learning part of the customer journey can be a competitive differentiator. All of this means that the enterprise needs to look at the learning that is needed by different people, both employees and customers. In the overall view of employee and customer experience, learning is a vital component that is no longer being overlooked.

Aragon sees three critical learning journeys that need to be addressed:

### **1. Onboarding**

New employees and new customers need to be onboarded and have the basic knowledge to get started. It is important that the initial onboarding experience be positive. Video can play an important role here.

### **2. Professional Skills and Employee Engagement**

This is where there has been a lot of focus on having a library of courses to address individual professional skills development. Associates, particularly younger ones, are looking for this type of training so they can advance faster. Enterprises need to be aware that a significant amount of skills-based training that is available is cursory—it often does not meet the needs for a power or advanced user.

### **3. Job Skills and Role-Based Training**

For specific role-based training, the business unit usually takes responsibility for this area. For example, in sales or service, those organizations will ensure that sales training or service training is delivered and ensures that sales people can sell and that service staff can repair equipment.

Sometimes there is a misunderstanding of the role that learning and development plays in the area of content. Today, with the shift to learning experience, L&D is racing to add more professional skills-based content. The business units are also in a race to digitize legacy classroom courses that also need updating.

The availability of modern training content opens up the choices for enterprises. In many cases, video learning, microlearning, and in-depth training courses all need to be part of a learning path. Getting the right mix is important. Today, enterprises are just discovering the power of both microlearning and video learning.

| Learning Journey                 | Employee Onboarding   | Employee Professional Skills                                  | Employee Role and Job Skills   | Compliance and Operations   | Customer Knowledge  |
|----------------------------------|---|---|--|---|---|
| Type of Training Needed          | Video Tutorials<br><br>Operational Manuals<br><br>Employee Communications | Off-the-Shelf Courses<br><br>Mentoring<br><br>Apprenticeships | Custom Courses<br><br>Microlearning<br><br>How-To Videos<br><br>Social Community<br><br>Learning Assistant | Custom Courses<br><br>Interactive OPS Manuals<br><br>How-To Videos<br><br>Microlearning<br><br>Social Community | How-Tos Videos<br><br>In-depth training courses<br><br>Customer Community |
| Responsible Primary Organization | HR and Business Unit  | Business Unit   | Business Unit  | Business Unit<br><br>With L&D Support   | Customer Support  |

Table 1: Understanding what is required in different learning journeys will help to decide the type of learning experience that is offered.

New standards, such as xAPI and learning records, are also making it easier to track content. Learning and development professionals understand that xAPI can open up the tracking of content, and more vendors are in the process of supporting xAPI.

One of the key evaluation criteria for learning providers needs to be the ease of adding content to their learning platform. This includes the ability to purchase content upfront or via the vendor’s app store or marketplace. The store/marketplace allows for ease of locating the partner apps and, in many cases, drives the purchase of apps.

**Custom Content is the Missing Link to the Complete Learning Experience**

Much of the current focus on learning experience is on volume of content but not on the need for custom content. Many providers do offer custom content, but there is also a robust market for authoring tools and this is where learning development comes into play. They often provide custom content services to the business or they outsource that development. A number of providers in this report provide tools or a platform for the creation and management of custom content.

**Microlearning and the Lessons from Sales**

Microlearning refers to the delivery of knowledge in small chunks at the time of need. Microlearning is ideal for knowledge intensive roles where employees may need certain information prior to or while performing a task. Nearly every job can benefit from microlearning. In sales, microlearning has become a requirement in some industries, such as life sciences. We see microlearning becoming more critical going forward in aerospace, defense, healthcare, retail, and manufacturing.



Testing the comprehension of just-in-time learning, quizzes, and microlearning can help a sales representative or call center rep instantly re-visit critical information. The big idea for just-in-time learning is that advanced applications can recognize upcoming activity and provide learning nuggets for knowledge retention related to a specific task, such as a sales call.

### **Learning Communities—The Evolution of Social Learning**

People still learn from others and today, learning communities provide key sources of information on best practices that both humans and support bots can leverage. The interactions in a learning community depend on the people available and interactions offered. Going forward, learning assistants will become important agents of knowledge sharing in communities. Social learning blends formal and informal learning into a modern, community-based experience.

Social learning networks are becoming knowledge networks, and the infusion of AI into these networks will accelerate the ability to locate answers. The more information that becomes available, the faster it can be understood and recommended to users via people or learning assistants.

### **Mobility Continues to Be a Critical Success Factor**

Mobility of professionals is a given and while for most, delivering mobile content is not an issue, this is not a requirement to overlook. Microlearning as well as video learning on mobile devices is one of the fastest ways to gain traction with business users.

The need for microlearning-based content, as well as interactive content on mobile devices can be a game changer, particularly for first-line workers. Microlearning providers such as Axonify and Qstream are making a difference when it comes to just-in-time delivery of microlearning on mobile devices. Additionally, the need for interactive custom content is being met by a few providers, such as InKling, that enable this unique capability.

### **Video Learning as a Catalyst for Knowledge Retention**

People who want to learn things quickly in their everyday lives turn to video tutorials, finding answers for everything from how to change a tire to how to sew on a button—which is why video learning has been on the rise in recent years. One of the reasons for its popularity is because it enables video microlearning. Users can also replay key scenes over and over again until they are sure they understand and can move forward. Replay accessibility makes video one of the fastest ways to learn a new task or procedure.

Because of the ease with which people can learn with video in their everyday lives, they will come to expect—and demand—this same form of learning in their professional lives. Enterprises would be wise to acknowledge this trend of video becoming the preferred learning method, which this research note will continue to explore.

As video continues to become the go-to learning method, we expect more learning providers to offer more video content management capabilities. Enterprises need to be prepared for the influx of video that will result from their employee learning requirements. The right tools will enable a seamless learning experience.

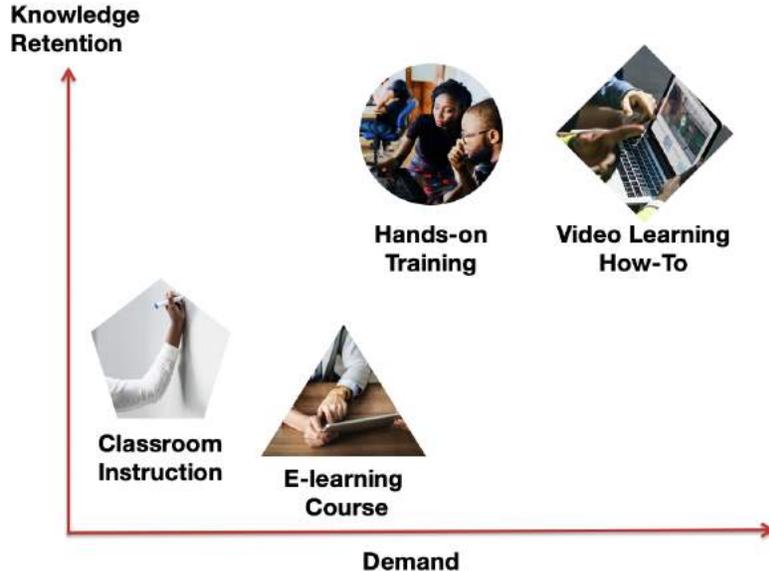


Figure 2: Video learning provides one of the highest rates of recall. It is also the type of learning content that has the highest demand by users in an enterprise.

### Predictive Analytics: Tying Performance to Knowledge

Business leaders want more robust analytics that show the impact of learning on business performance. Microlearning and quizzes, which can deliver or reinforce knowledge at the time of need, are becoming an essential part of the modern learning experience. This is what business leaders desire and we are still in the middle of the journey to better analytics. Analytics can measure more data on knowledge than ever before, allowing businesses to focus on specific units or teams that need additional training to boost performance.

Aragon feels that we are at the beginning of the predictive learning era in which courses and content are recommended and delivered to students on demand. When machine learning is added to a learning platform or learning community, better training recommendations can be made. A number of providers in this report offer predictive capabilities.

Now it is about locating the right video content all the way down to a scene. These advances in content analytics mean that libraries of existing recorded video content can be unleashed to help power-up knowledge sharing at new levels.

Learning experience offerings, with Netflix-like delivery and machine learning-based personalization, can not only deliver the recommended content to users, but also let management know when recommended content is not being viewed.

Aragon expects more providers to enhance their analytics capabilities to allow better usage of video, particularly when it comes to search and discovery. Being able to recognize and identify people and objects in a video is part of video-enabling business applications. As more video analytics come online, the demand for video-enabled applications will grow exponentially.

**Prediction:** *By YE 2021, 30% of learning analytics offerings will be tying performance to knowledge level of the associate.*

### **Learning Assistants Versus Support Chatbots**

While still early, one of the trends that is coming online is the shift to learning assistants. Before we arrive at learning assistants that will essentially be able to deliver knowledge on the fly, Aragon expects that question-and-answer chatbots will be a great interim step to faster knowledge for people.

Today, assistants are emerging to help with job placement and recruiting. Aragon is predicting that learning assistants will be commonplace by 2021.

While learning assistants are clearly the way forward, enterprises should also look at starting with a set of question-and-answer chatbots for specific roles. This approach assures success and can be developed and deployed relatively quickly. In many cases, enterprises may need to look at a different set of providers for chatbots and digital assistants.

**Prediction:** *By 2021, 50% of enterprises will offer a learning assistant to help employees and customers with their training needs.*

### **Enterprises: Balancing the Focus on Employee Engagement Versus Operational Success**

With the focus clearly on employee engagement as part of a way to increase satisfaction and retention, there is also the bigger need for better role-based knowledge to ensure higher performance. The learning market is changing and providers are adapting, and enterprises need to examine these two intersecting trends: the need for engagement, and the need to train their people and customers in a more holistic fashion.

Learning platforms will power innovation and allow enterprises to do more with their investments in a shorter amount of time. Enterprises looking to innovate their knowledge delivery should look to extend their offering by integrating it with other applications.

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## Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We do a rigorous analysis of each vendor, using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Globe will reflect how complete a provider's future strategy is relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared, regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance, but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

## Dimensions of Analysis

The following parameters are tracked in this analysis:

**Strategy** reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

**Performance** represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer Experience:** Feedback on the product, installs, upgrades, and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and Packaging:** Is the offering priced and packaged competitively?
- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

**Reach** is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international*, or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

### The Four Sectors of the Globe

The Globe is segmented into four sectors, representing high and low in both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand and effectively perform against those strategies.
- **Contenders** have strong performance, but more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives but have yet to perform effectively across all elements of that strategy.
- **Specialists** fulfill their strategy well but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

### Inclusion Criteria

The Aragon Research Globe™ for Corporate Learning, 2019 will help clients differentiate the many vendors that offer tools to let enterprises manage and deliver all forms of learning.

The inclusion criteria for this Aragon Research Globe are:

- **Revenue:** A minimum of \$4 million in primary revenue for learning products or services (LMS, LCMS, classroom, authoring) or a minimum of \$15 million in revenue in a related market (Talent Management, collaboration, or learning content courseware).

- **Shipping product:** Must be announced and available.
- **Customer references:** Vendor must provide customer references in each region where the vendor does business.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe™ process. Technology Providers Docebo, Lumesse, and Mzinga did not respond to Aragon requests for incremental information and/or did not review the draft of this research note. Aragon's analysis is based on its research and use of other valid sources including:

- Publicly available information
- Discussion with enterprises that use the product

Non-participation by Technology Providers in the Aragon Research Globe™ process does not affect their inclusion in this research note. The inclusion criteria listed in this research note is the determining factor.

### **Inclusions**

The following vendors were new to this year's Aragon Research Globe:

- **Inkling**
- **Qstream**

### **Exclusions**

The following vendors were excluded from this Aragon Research Globe:

- **Area9 Lyceum**, a spinoff of Area9, offers a learning platform that enables adaptive learning.
- **EdCast**, based in Mountain View, focuses on microlearning and offers just-in-time capabilities, such as GuideMe.
- **IBM** is focusing more on its Watson Talent offerings, including but not limited to Career Coach.
- **Lumesse**, which was acquired by Saba.
- **Workday** is one of the fastest-growing cloud providers of human capital management and financial management solutions.

**The Aragon Research Globe™ for Corporate Learning, 2019**  
(As of July 30, 2019)



Figure 3: The Aragon Research Globe™ for Corporate Learning, 2019.

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## **Leaders**

### **Cornerstone OnDemand**

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Cornerstone OnDemand (CSOD) continues to lead with learning as part of its overall talent suite. It has been evolving its complete learning platform and has added an increased focus on learning experience and an expansion of its content partnerships. Its LXP can deliver Netflix-style learning channels support, enhanced collaboration, and the ability to deliver user-generated video and off-the-shelf content.

In 2019, Cornerstone announced an updated Salesforce integration and Express Class—its informal learning offering. Express Class allows end users, instructors, or administrators to quickly capture a record of unplanned gathered learning that took place for small or large groups, including what learning happened, who was there, and the outcome for each attendee. Cornerstone's growth has been fueled by Content Anytime, its subscription-based service that integrates with a growing number of third-party content providers.

Cornerstone Create is its new content creation tool enabling quick deployment of microlearning modules, which will be popular with buyers looking to allow self-service content creation for the experts in their organizations. Its Cornerstone Insights offers predictive analytics dashboards across the talent management suite, including learning. With its modern learning approach and new content integrations, Cornerstone is prepared for the surge in demand for learning.

#### **Strengths**

- Talent and learning platform
- Compliance enablement at scale
- Video and mobile learning
- Content offerings and delivery
- Content creation
- Predictive analytics
- Marketplace for Apps

#### **Challenges**

- Balancing focus on mid-market and large enterprise

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## D2L

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D2L offers solutions for both higher education and corporate markets. D2L's Brightspace provides an engaging experience for the learner with a particular strength in video learning. It also offers tools for learning administrators, instructional designers, and subject matter experts. Brightspace supports social learning and assessment, content creation and curation, adaptive learning pathways, and integrated video across the platform. D2L meets the needs of custom content creation by enabling SMEs to create short videos and share videos with a community of their peers. Additionally, it offers video-based assessments, including online quizzing, assignments, and feedback for coaching.

The 2019 Indigo release features expanded learning paths and employee engagement features. Performance management capabilities were added as well, including a quick eval between the manager and associate. D2L integrates well with other content vendors and is adding new partnerships with leading providers to deliver best-in-class corporate training content. D2L has been expanding its corporate footprint with associations, Fortune 500 customers, and continuing education.

### Strengths

- Learner experience
- Content creation and curation
- Video capabilities
- Analytics
- Content and technology integrations

### Challenges

- Awareness outside of North America

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## Degreed

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Degreed, based in San Francisco and Utah and led by CEO Chris McCarthy, has continued to push its learning experience platform that it promotes by offering 1500 unique skills. In June 2019, Degreed announced that it had received an additional \$75 million to help it continue its platform and customer expansion. Degreed aggregates content from multiple sources, including CrossKnowledge, Lynda.com, OpenSesame, and Skillsoft. The Degreed mobile app makes it easy to take courses on the go, and its personal signup option is a great way for enterprises to get started.

In June 2018, Degreed announced that it had acquired Pathgather, which is known for its easy-to-use learning offering that integrates disparate components into one point of access. Pathgather will also help Degreed with more robust LMS/tracking capabilities. In 2018, Degreed introduced an enhanced skill assessment capability that leverages quizzes and machine learning. Degreed continues to expand globally and offers courses in multiple languages.

### Strengths

- Modern learning
- Content partnerships
- Skill certification
- Mobile app

### Challenges

- Awareness outside of North America

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## Meridian Knowledge Solutions

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Meridian Knowledge Solutions, based in Reston, VA, hired industry veterans Patrick Devlin as its Chief Business Development Officer and Paul Terry as its new Chief Strategy & Operations Officer. Its learning platform, Meridian LMS™, focuses on delivering best in class learning solutions that are fully mobile-enabled. Meridian has a heritage of selling to Defense, Federal, and State and Local Government buyers, who need strong compliance and extended enterprise capabilities, as well as extended commercial enterprises. In 2019, Meridian added machine learning to its platform to enable more personalized course recommendations to users.

Meridian LMS™ capabilities include responsive design, intuitive user experience, deep certification functionality, eCommerce support, gamification, microlearning, and career development. New capabilities added in the Spring 2019 release make it easier to build playlists and offer a streamlined way to do training assignments. Meridian leverages extensive partnership networks—which include OpenSesame, BizLibrary, and content authoring leader, DominKnow—and it recently announced a partnership with K12 to offer more online training to teachers. Meridian makes it easy for customers to create their own content with their own set of authoring tools.

### **Strengths**

- Extended enterprise
- Content creation
- Compliance (government & commercial)
- Mobile-first learning
- Integration capabilities (APIs & Web Hooks)
- Scalability & security
- Cloud or behind the firewall

### **Challenges**

- Market awareness outside of the US

## Oracle

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Oracle has made investments in its Oracle Learning Cloud (OLC), offered as part of its talent management cloud, which features a modern interface and learning communities. Oracle continues to leverage video and learning, which positions Oracle well to support the growing demand for user-generated content.

In 2019, Oracle continued to enhance OLC, which included adding native Skillsoft integration as well as Webex for virtual classes. Oracle is emphasizing its Adaptive Intelligent Apps (AI) in HCM and has recently added chatbots to its recruiting application. The added focus of AI with the HCM and talent cloud reflects that Oracle's large R&D investments have been in a protracted battle with competitors for its core HCM install base. As such, it has significantly refocused on its HCM cloud offerings. For buyers using Oracle HCM and talent management suite, Oracle Learning Cloud is a solid choice.

### Strengths

- Video learning
- Communities
- Investment in AI
- Overall strength of HCM Suite
- Extended enterprise

### Challenges

- Meeting demand for learning content

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## PeopleFluent

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PeopleFluent, which was acquired by Learning Technologies Group in 2018, has continued to grow by targeting its talent suite in vertical markets including healthcare, manufacturing, transportation, and financial services. PeopleFluent Learning now includes all of the capabilities of the former NetDimensions LMS. The PeopleFluent Talent Productivity Platform is being adopted by customers who are using it to help accelerate knowledge transfer, in part because of its strengths in combining both social and video learning.

Because of its formal and informal capabilities, the PeopleFluent Talent Productivity Platform provides a next-generation learning platform. The combination of on-demand learning, embedded microlearning, formal instruction, social interactions, mentoring, and video content delivery along with the NetDimensions customer base in highly regulated industries make them one of the firms to watch.

### Strengths

- Video learning
- Social/collaboration capabilities
- Vertical market expertise
- Analytics
- Strength of overall talent management suite

### Challenges

- Content partnerships

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## **Saba**

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Saba, based in Dublin, CA and led by CEO Phil Saunders, has been experiencing growth through a combination of organic sales and acquisitions. In 2018, Saba acquired Lumesse to bolster its European customer base. The Lumesse deal also provides Saba with a robust content ecosystem. Saba entered the market early with its predictive learning assistant capabilities called TIM (The Intelligent Mentor).

In 2019, Saba enhanced its mobile learning experience with an updated mobile app that enables personalized learning, which includes content portals, curated and shareable learning collections, with real-time performance coaching, feedback, and check-ins.

With a more focused mobile learning experience, Saba continues to win because of its scalability and complete learning platform, which includes virtual classroom, social communities, predictive learning, advanced assessment, and mobile capabilities. With its acquisitions and its organic innovation, Saba continues to enable its customers with the learning they need in a digital era.

### **Strengths**

- Social, video, and mobile learning
- Virtual classroom
- Predictive analytics and capabilities (TIM)
- Rich APIs and drag and drop marketplace
- Learning Record Store (LRS) and learning journeys

### **Challenges**

- Focus on learning vs overall talent management

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## Skillsoft

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Skillsoft continued to expand its learning experience offering, Percipio, and at the same time continued to expand its content offerings. Percipio is a cloud-based, state-of-the-art content delivery and immersive learning experience platform. Percipio was the first to add a learning assistant that it calls Percipio Embedded Learning Synchronized Assistant (ELSA). Percipio offers an intuitive and personalized experience with AI-driven recommendations based on user interests and online behaviors. It supports the hosting of custom content (e.g. AICC, SCORM, various formats) for clients and it can aggregate content from different free/paid sources. Clients can customize the library and the learning paths, give assignments with due dates, and deliver e-learning and compliance from the same platform.

Skillsoft has continued to expand and enhance what is one of the largest off-the-shelf content libraries and demand for learning content continues to grow. In 2018, Skillsoft added compliance, leadership development, and digital transformation content to its Percipio platform, which now supports multiple languages. The content has been redesigned to be video-based and microlearning to fit into busy schedules. Skillsoft makes it easier for enterprises to streamline learning journeys with its combination of a learning platform and its growing library of business, leadership, productivity and collaboration, tech+dev, and compliance content.

### Strengths

- Install base
- Consumer-grade user experience
- Learning assistant (ELSA)
- Mobile iOS and Android apps
- Video-based microlearning
- Learning journey
- FedRAMP certification
- Robust content library
- Flexible deployment model

### Challenges

- Migration of install base to Percipio

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## Contenders

### **Blackboard**

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Blackboard continues to be one of the leading learning suppliers in the Higher Education and K-12 markets. Blackboard Learn is the company's flagship LMS and it integrates with its other solutions, including Blackboard Collaborate, which offers full virtual classroom capabilities. In 2019, Blackboard expanded its cloud SaaS offerings for Blackboard Learn with support for Canada, China, and 25 other countries. Blackboard also supports Amazon's FedRAMP-certified AWS GovCloud, which will help it maintain and win more U.S. Federal Government learning business.

In 2018, Blackboard rebranded its Moodle offering as its Blackboard Open LMS. Last year it also expanded its content partnerships to include VitalSource, a provider of digital content and textbooks. This adds to Blackboard's existing integration with Lynda.com for off-the-shelf courseware and now supports integrations with content management providers such as Dropbox and many more.

#### Strengths

- Built for education
- Collaboration tools
- Predictive capabilities
- Virtual classroom
- Accessibility
- Mobile solutions
- Full suite of learning products and solutions

#### Challenges

- Known mainly in the K-12 market

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## **CrossKnowledge**

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CrossKnowledge is a growing learning firm with a full learning experience platform, and a robust set of learning content that it also licenses to others. Its success in learning outsourcing has allowed it to attract a growing number of brands. CrossKnowledge has a robust set of content that includes a focus on employee development, leadership development, sales excellence, and onboarding.

CrossKnowledge Mohive offers the ability for clients to create their own learning content that is fully mobile-enabled. The CrossKnowledge Learning Suite offers students the ability to create or leverage learning paths that incorporate the over 20,000 courses that are part of the CrossKnowledge Library. CrossKnowledge has been able to leverage its learning suite platform to take advantage of the growing demand for extended enterprise training for customers and partners. Part of the appeal is the platform, the content, and the portal customization features. With the power of Wiley and Sons behind it, CrossKnowledge is well positioned for the growing demand for learning content.

### **Strengths**

- Learning outsourcing
- Learning suite
- Content authoring
- Content library
- Sales use case
- Management and leadership development

### **Challenges**

- Market awareness in North America

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## **SAP SuccessFactors**

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SAP SuccessFactors offers one of the leading talent management platforms on the market. It offers learning management as part of the integrated offering. The SAP SuccessFactors People Central Hub makes it easier to consolidate HR data in the cloud. SAP Jam, which is the social learning part of SuccessFactors, is reaching end-of-life and is now in maintenance mode.

SAP SuccessFactors has a large learning install base and continues to partner with Degreed to offer more learning experience choices to customers. At the same time, SAP SuccessFactors offers its own Open Content Network, which features partnerships with external content providers OpenSesame, Udacity, Coursera, Lynda.com. In 2019, Skillsoft was officially approved as well. These partnerships make it easy for enterprises to access this partner content, thanks to its integrated eCommerce. Enterprises that want a full talent management suite with integrated learning often select SuccessFactors.

### **Strengths**

- Platform scalability
- Overall talent and HCM focus
- Learning functionality
- Courseware integration
- Marketplace App integration

### **Challenges**

- Focus on learning versus talent and HCM platform

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## SumTotal

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SumTotal Systems, which is owned by Skillsoft, offers a complete talent development solution with learning at the core. Its modern and engaging user experience leverages machine intelligence and leverages all of Skillsoft's content to address the needs of skill development and employee engagement. In addition to Skillsoft, in 2019 SumTotal announced the support for LinkedIn Learning and EdX content as well.

SumTotal now also supports content aggregation from nearly any source. For user-generated content, it now allows users to share content on an ad hoc basis via curated play lists. SumTotal has also maintained its expertise in enabling enterprises to offer extended enterprise capabilities so that they can train their customers. The updated e-commerce capabilities make it easy for customers to offer embedded and integrated payment options for training.

### Strengths

- Install base
- Talent management
- Learning management
- Talent acquisition
- Robust learning content library
- User experience
- Customer choice
- Flexible deployment model

### Challenges

- Educating Skillsoft customers which platform is right for their organization— Percipio Learning Experience Platform or SumTotal Talent Development solution

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## Innovators

### **Axonify**

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Axonify, based in Canada, offers the Axonify Microlearning Platform that combines AI-based adaptive learning capabilities with gamification, creating an engaging learning experience that focuses on building frontline employee performance. In 2019, Axonify announced an expansion of its operations into the European market with an office in the UK, growing its partner network in EMEA, as well as new strategic partnership with SAP, with availability of Axonify on the SAP app marketplace and integration with SAP Learning. In 2019, Axonify also made custom content development a standard part of the Axonify platform offering for every customer. This is in addition to the introduction of Axonify's Content Exchange content marketplace in partnership with BizLibrary and a host of other content providers in 2017.

In 2018, Axonify launched Axonify Impact™, a new learning attribution engine that uses AI and big data to measure the impact of training for programs delivered through Axonify's platform. Axonify focuses on training frontline employees, such as retail associates, contact center agents, field sales reps, as well as plant and logistics workers across a variety of industry verticals. Axonify's focus on microlearning, combined with continuous daily training reinforcement via its AI-based adaptive learning engine is a learning platform for buyers looking to drive frontline employee engagement and performance.

#### Strengths

- Microlearning
- Analytics
- AI-powered adaptive learning
- Video and question-based training content
- Gamification and training engagement
- Mobile device support
- Focus on sales and contact center

#### Challenges

- Market awareness outside of North America

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## Cegid

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Cegid Group has two core offerings that are provided globally: retail solutions and talent management, which includes a major focus on learning. Cegid offers a modern learning experience that includes the ability to offer custom learning paths. The Cegid talent portfolio includes learning, recruiting, performance, succession planning, compensation, and analytics. Cegid's Learning and Development Platform is a full LMS and also supports video learning as a core offering, which enhances the overall approach to social learning.

Cegid has continued to expand its content partnerships with OpenSesame and others to meet the growing demand for off-the-shelf content. It also offers the ability to create simulations, which is an important content type for their core healthcare and retail markets. The Cegid PeopleVision Analytics offering leverages big data, incorporates predictive capabilities, and provides insights across the talent modules.

### **Strengths**

- Learning features and portal
- Talent management suite
- Learning paths
- Dashboards and analytics
- Content partnerships
- Video learning

### **Challenges**

- Balancing focus on retail vs talent management

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## **Docebo**

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Docebo, which has a full feature set and a modular design, continues to win new accounts in EMEA and North America. Docebo offers Docebo Coach and Share, its modern learning offering. In 2019, Docebo announced the availability of its mobile app publisher, which can be customized with capabilities such as matching the look and feel of the customer's brand.

Docebo expanded its core learning offering with AI-based course recommendations for learners. The Docebo Content Marketplace was enhanced in 2018 with its announcement of a partnership with LinkedIn Learning. Docebo is also compatible and works with Salesforce, which will help it meet the growing demand for Sales Coaching and Learning.

### **Strengths**

- LMS capabilities
- Mobile app
- MOOC builder
- Coaching

### **Challenges**

- Balancing OEM vs direct sales

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## **Inkling**

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Inkling, based in San Francisco and led by CEO Jeff Carr, is a mobile learning enablement platform for distributed workforces. It supports the creation of interactive content and learning on the go that replaces legacy operation manuals, and delivers modern and highly impactful learning programs around mission-critical operations or other fast-moving initiatives. Inkling is focused on an operations experience offering that leverages its HTML interactive content, which can be accessed on phones, tablets, and PCs. Inkling creates interactive learning content that includes text, audio, and video, that is ideal for operations teams such as sales, service, and other customer-facing teams.

Inkling Knowledge enables dynamic content creation on any device, including intelligent search making it ideal for just-in-time performance support. Inkling Learning Pathways streamlines the learning process to improve engagement, performance, and information retention, and allows managers to track and verify trainee skills. Inkling also has a mobile operations platform called Inkling Collaboration.

### **Strengths**

- Learner experience
- Content creation and curation
- Operations use case
- Sales enablement use case
- Video content support
- Content and technology integrations

### **Challenges**

- Awareness outside of North America

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## **NovoEd**

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NovoEd, led by CEO Ed Miller, was acquired in October 2018 by Devonshire Investors for an undisclosed sum. NovoEd delivers high impact learning experiences that enable enterprises, social impact organizations, and executive education programs to engage their learners and drive critical skill development at scale. The company focuses on mobile and social learning and in 2019, NovoEd announced a new native mobile app and a new authoring tool that allows for the fast creation of learning content.

Creating collaborative learning experiences suited to the development of high-value organizational skills is NovoEd's sweet spot; it can deliver learning across PCs, tablets, and phones. This blend of continuous formal and informal learning increases engagement and drives outcomes. AI-based usage tracking allows users to see what is trending in their learning community, which makes for a more engaging and effective social learning experience. The ability to create learning courses and to then build the right learning paths makes NovoEd a provider to watch.

### **Strengths**

- Modern learning experience
- Social, team-based learning
- Mobile support
- Content authoring
- Dashboards & analytics
- Social learning

### **Challenges**

- Content partnerships

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## **Qstream**

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Qstream, based in Boston and Dublin, and led by CEO Richard Lanchantin, is an enterprise learning application focused on reinforcing job-specific knowledge and capabilities to drive business and learning outcomes. Qstream solves a big problem: time to learn and develop critical skills is short, and so is the lifespan of information. This puts organizations under duress to ensure that their employees can recall the right information at the right time in the work environment for an optimal result. They pioneered the delivery of the spaced learning method for high-value, custom micro-content for healthcare, sales, life sciences, and other knowledge-intensive industries. They now are expanding across business functions where there is a need to better enable knowledge workers.

Qstream has made it easy to deliver, reinforce, track, and analyze knowledge proficiency and engagement in the learning experience from a mobile device. It's simple scenario-based question and answer approach to knowledge delivery, which includes game mechanics and peer socialization, is proven to change behaviors and support professionals in developing the skills they need to succeed. Qstream also informs managers on precise knowledge gaps for each individual or at team level to know who and when to coach, so learning leaders can plan remediation in regions, or cohorts, where performance may be lacking. Given their expertise in microlearning, enterprises may find it as an easy add-on to an existing learning program, or as a standalone tool.

### **Strengths**

- Just-in-time knowledge delivery
- Life sciences install base
- In-depth proficiency and assessment analytics
- Scenario-based, job-specific learning
- Enterprise-grade mobile capabilities

### **Challenges**

- Market awareness outside of North America

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## **Specialists**

### **Gyrus Systems**

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Gyrus Systems offers a cloud-based LMS-focused learning solution called the GyrusAim Learning Cloud. GyrusAim includes advanced gamification integration with openbadges.org and a brand new responsive HTML5 interface. GyrusAim has also simplified workflows for administrators, instructors, students, and managers.

Gyrus partners with OpenSesame and VADO for off-the-shelf courseware. It also partners with DominKnow for courseware authoring. Gyrus supports multiple eCommerce integrations that make for a solid and extended enterprise option when combined with assessments. It also has an API platform to enable integration with third party applications. With support for over 15 languages out of the box, Gyrus supports the needs of a growing enterprise.

#### **Strengths**

- LMS capabilities
- Dashboards
- Skills-based learning approach
- Language support

#### **Challenges**

- Market awareness

### **Aragon Advisory**

- Enterprises should evaluate learning providers to ensure that they offer a modern and engaging learning experience.
- Enterprises need to look at providers that can support the different types of learning content.
- Enterprises need to realize that in most cases, they will need more than one learning provider to meet their needs.
- It is a key requirement that content and courses should be easy to add and integrate into and vendors' platform content offerings should be examined for ease of use.

### **Bottom Line**

Modern learning is about experiences, and this requires enterprises rethink their approach to customer and employee engagement. Modern learning is as much about content and learning channels as it is about scheduling and analytics. Business leaders and learning and development professionals should look at their current learning providers and ensure that they can meet current and future needs, for content and for knowledge delivery, especially when it comes to micro-learning.